Mobilizing and Motivating Your Staff To Get Results

A technical assistance guide for charter school leaders

Charter Friends National Network

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About the Authors

Mobilizing and Motivating Staff to Get Results was prepared by a team led by **Public Impact**, a North Carolina-based education policy consulting firm. Among those contributing to the guidebook include (*in alphabetical order*) Bryan C. Hassel, Emily Ayscue Hassel, Debra Isaacson, Jean Krasnow, Michelle Godard McNiff, and Katie Walter. Public Impact has produced numerous technical assistance resources for charter and other public schools on issues such as professional development, comprehensive school reform, school governance, accountability, and facilities.

For more information about Public Impact, visit http://www.publicimpact.com.

About the Sponsoring Organizations

The **Annie E. Casey Foundation** is a private charitable organization dedicated to helping build better futures for disadvantaged children in the U.S. Recognizing that strong families and strong neighborhoods are interdependent, the Casey Foundation is supporting broad strategies for neighborhood development and family transformation in twenty-two urban communities around the nation through its *Making Connections* initiative.

For more information about the Annie E. Casey Foundation and the *Making Connections* initiative visit the website or contact:
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The **Charter Friends National Network (CFNN)** is a project of the Minnesota-based Center for Policy Studies in cooperation with Hamline University. Founded in early 1997, CFNN's mission is to connect and support state-level charter school organizations – mainly non-profit resource centers and associations of charter school operators.

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Introduction

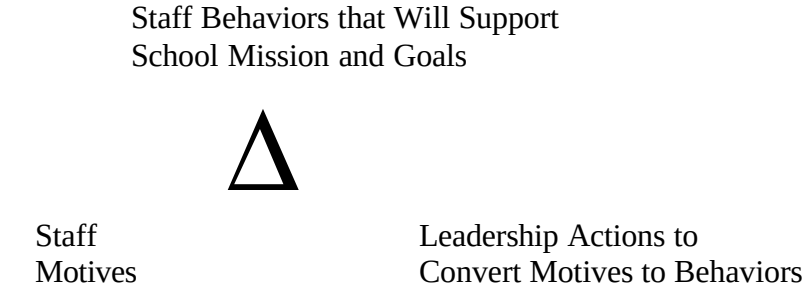
Why This Guide?

Because of their freedom, charter schools face a unique opportunity to transform American education. Nowhere is this opportunity more compelling than in the area of "human resources" — the ways charter schools mobilize and motivate staff to achieve results. Though the legal framework varies from state to state, most charter schools possess a great deal of autonomy when it comes to managing people.

Charter schools in many places can hire any qualified person to teach, even if they lack the formal credentials required by district schools. Most charter schools can also organize professional development programs, set compensation, and evaluate staff in ways that support their missions and meet the unique needs of their school—opportunities that are often not available to district schools. These ingredients are important for they help build a unique school culture that rallies the school's people to achieve results. But all the freedom a charter school may possess will not change a thing unless its leaders seize the opportunity.

Each of these opportunities — however compelling — places new demands on the leaders of charter schools. Each of them requires school leaders to learn new skills, and to make judgments that leaders in more traditional settings aren't called upon — or even allowed — to make. *Mobilizing and Motivating Staff* is a handbook created for leaders of both solidly established and newly founded charter schools. It is designed to help you think, plan, and act in ways that make the most of your best asset — your people. The guide's aim is to help you convert your staff's natural drives and talents into behaviors that support your school's specific vision, needs, and objectives.

Motivating school staff effectively requires school leaders – principal and active board members – to understand three points on a triangle: What inherent *motives* drive your staff members to perform well in their roles? What staff *behaviors* will best support the school's mission and goals? What *leadership actions* will turn staff motives into staff behaviors that support the school's goals? (Note that students are core to the triangle, because their needs drive the school's goals over time.)



Encompassing this triangle is the school's external environment—which will naturally shape the staff behaviors, staff motives, and leadership actions to some degree. Relevant external issues

include a wide range of factors, including restrictions on charter schools and the quality and availability of the teaching pool. Though the guide will not address these environmental factors directly, it often takes into account these external considerations.

Overview of Contents

The guide is presented in three chapters. The first, **Building the Foundation**, explains the key building blocks of leading a charter school's staff — the school's mission and strategy, and the structure of its leadership and governance. These building blocks are the foundation on which the rest of the guide constructs a framework to help you think about your human resources.

The second, **Recruiting and Selecting Staff**, provides ideas about finding the right people to work at your school. This chapter discusses how to know what kinds of people you're looking for, where to find people that meet those criteria, and how to create a successful process of deciding whom to hire.

The third and largest chapter, **Supporting Performance**, discusses ways to help the staff you have achieve the results you seek. It lays out a "cycle" of performance, including goal-setting, coaching and development, evaluation, and rewards through which leaders can help their staff members be their best. And it suggests ways school leaders can nurture the spirit of the school, creating a culture that supports performance.

Building the Foundation

Mission and Strategy

Before you can think about how to mobilize staff to achieve results, you have to be clear about what results your school aims to achieve — your school's *mission*. You also have to be clear about how you plan to achieve that mission — your school's *strategy*. The mission states in broad terms the school's purpose. The strategy lays out a plan for fulfilling that purpose — a set of more specific goals to be achieved, an array of approaches to be used, a mechanism for evaluating progress and improving continuously.

The mission should capture the very reason the school exists; the strategy should be the blueprint by which the school leader acts to achieve that mission. Peter Senge, in *The Fifth Discipline*, illustrates this point in describing the importance of the "design' of an organization. He writes:

> Imagine that your organization is an ocean liner and that your are the 'leader.' What is your role? I have asked the question to groups of managers many times. The most common answer is, not surprisingly, 'the captain.' Others say the 'navigator,' 'helmsman,' or the 'engineer.' The answer is the designer. The neglected leadership role is the *designer* of the ship. No one has a more sweeping influence than the designer. What good does it do for the captain to say "Turn the boat 30 degrees to starboard" if the designer has built a rudder that that will turn only to port. It's fruitless to be a leader in an organization that is poorly designed. Design is often a neglected dimension of leadership: little credit goes to the designer. The functions of design are rarely visible; they take place behind the scenes. But the consequences that appear today are the results of work done in the past, and work today will show its benefits far in the future. I call this the quiet design work of leadership.[1]

Your mission and strategy are critical building blocks for all the activities that fall under the term "human resources." When you recruit and select new teachers, you look for individuals that have the qualities needed to implement the strategy and achieve the mission. When you help individual staff members or teams set goals, you align those goals with the school's broader aims. When you provide coaching or design professional development opportunities, you seek to build the specific capacities that allow the school to live up to its purposes. When you evaluate and reward performance, you do so in a way that supports what the school is trying to accomplish.

Because mission and strategy are so fundamental to all aspects of human resources — as well as to the school as a whole — they cannot be neglected by school leaders. A full discussion of how to develop a mission statement or create a strategic plan, however, is beyond the scope of this guide. Fortunately, some excellent resources exist to help charter schools lay these foundations — you will find them in box entitled "Resources for Developing Mission and

[1] Peter Senge. "The Leader's New Work" in *The Fifth Discipline: The Practice and Art of the Learning Organization*. New York: Currency Doubleday, 1990.

Strategy." Additionally, the "Guiding Questions" tool in Appendix A can help you assess if your mission statement and strategic plan are serving the purposes for which they are designed.

Resources for Developing Mission and Strategy

The uscharterschools.org website's "Developing a Mission Statement" page includes advice about creating a mission statement and links to samples.
http://www.uscharterschools.org/pub/uscs_docs/ta/mission.htm

The Massachusetts Charter Schools Resource Center's *Charter School Handbook* contains a chapter on the mission statement.
http://www.pioneerinstitute.org/csrc/cshb/mission.cfm

Workbook 1 in NWREL's *Charter Starter* series provides help on developing a mission statement.
http://www.nwrel.org/charter/publicat/charter_workbook.html

The SERVE Leaders Institute's website contains numerous resources on "visioning" for schools.
http://www.serve.org/leaders/visionin.htm

In charter schools, "strategic planning" often takes the form of "accountability planning," a process through which schools clarify their missions, set concrete goals, select assessments, and devise approaches to meeting their goals and using data to improve. Try the following resources on accountability planning:

National Charter School Accountability Network
http://www.charterfriends.org/accountability/cfi-accountability7.html

Uscharterschools.org resource page on Accountability
http://www.uscharterschools.org/pub/uscs_docs/ta/account.htm

California Charter School Development Center's *A Comprehensive, Practical Guide to Holding Charter Schools Accountable*; order via:
http://www.csus.edu/ier/charter/pubs.html

Leadership and Governance

Helping the school's people carry out the school's strategy and achieve its mission is the job of the school's leadership. In your charter school, "leadership" may include the head of school (principal), board members, teachers and other staff. To make this guide more concise, we will use the term "leader" as a substitute for all of these positions that may practice leadership in your school; you should substitute whatever specific form of leadership your school uses.

The way governance is structured in the school can have a great influence on how leaders carry out their jobs as well as how the school's staff members respond to its leaders and tap into their own leadership potential. Charter schools, for the most part, are free to establish their own structures of leadership and governance, and so they have the opportunity to do so in a way that capitalizes on the strengths and motivations of the school's people.

Whether you talk to scholars of organization or to real school leaders, you'll quickly find there's a raging debate about "the best way" to structure an organization's governance and leadership structures. A companion piece to this guide, the *Creating An Effective Charter School Governing Board Workbook (available online at www.uscharterschools.org/gb/governance/)*, contains a detailed discussion of the governance arrangement most charter schools use — a volunteer board of trustees overseeing a paid staff. But there are alternatives to this common model, and some of them have implications for the topic of this guide — motivating staff to achieve results. As you can read in the box entitled "When Teachers 'Own' the School," a growing number of charter schools are run by teacher cooperatives — and advocates of this approach claim that it helps mobilize teachers like no other form of governance.

When Teachers "Own" the School

Minnesota New Country School in Henderson has no employees. Instead, all of the teachers are members of a cooperative that contracts with the school's board of trustees to operate New Country. Together, teachers set the school's curriculum and instructional approach and decide how to spend the school's funds. Even more unusual is the fact that teachers "manage" themselves — hiring new colleagues, evaluating staff performance, even setting pay and dismissing teachers who aren't meeting expectations.

Members of the cooperative, known as EdVisions, say the structure puts teachers in a unique position to lead their school. It also holds them uniquely accountable for achieving results, since their continued contract depends upon producing outcomes. And since their own compensation depends upon the broader spending choices and fiscal health of the school, teachers have strong incentives to spend and invest in ways that they think will "pay off" in results for students.

As EdVisions has begun to work with more schools, it has developed a variety of services for its members and the schools in which they teach. The cooperative helps teachers plan and develop charter proposals, payroll, benefit and fiscal services, offers teacher preparation and staff development programs, and conducts academic and program evaluations. The result is a new form of professional association for teachers.

For more information about the Minnesota New Country School, see http://mncs.k12.mn.us
To learn more about EdVisions Cooperative, visit http://www.edvisions.com

Whatever form of leadership and governance your school adopts, those entrusted with leading the school need to carry out some basic functions in order for the school to flourish. The role of

the leader plays out at several different levels, described in the table, Leadership Roles.[2] The remainder of this guide focuses primarily on the middle level — establishing the processes related to human resources that enact the school's strategy. The third column of the table includes some examples from two central human resources activities —staff selection and professional development.

Leadership Roles

Level	Work involved	Examples for leadership in human resources
Strategic	• Formulating strategy and overall goals • Creating policy • Positioning organization to work effectively within its environment • Building organizational climate to support the staff	• Setting as a goal that the school will hire staff that meet certain high standards • Allocating a significant portion of the budget to professional development
Managerial	• Establishing the processes to carry out the organization's strategy	• Creating an objective interview protocol • Establishing a process by which staff assesses professional development needs based on student results
Operational	• Managing in the day-to-day	• Interviewing prospective staff • Selecting specific professional development activities

Of course, governance and leadership are not necessarily synonymous. While governance often refers to the official management structure of an organization, leadership sometimes comes from strong and influential staff who may not hold official titles. Governance works best when strong and influential people are empowered to make good decisions and when all staff is encouraged to develop these good decision making skills and sense of empowerment. Good governance and leadership involves developing leadership capacity among all members of an organization around its mission. The "managerial"-level duties of establishing processes recognize what school leader actions are necessary for motivating the type of staff behaviors needed to do build personal empowerment around organizational goals. *Reengineering Performance Management: Breakthroughs in Achieving Strategy Through People* offers a simple list of such motivating actions identified in research includes[3]:

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- defining staff performance expectations
- communicating expectations with staff

[2] Charles J. Fombrun, Noel M. Tichy, and Mary Anne Devanna --describing Robert Anthony's work. *Strategic Human Resource Management*, (1984)

[3] Lists adapted from Tracey Weiss and Franklin Hartle. *Reengineering Performance Management: Breakthroughs in Achieving Strategy Through People.* Chapter 10, *The Genius of Leadership.*(1997)

- creating a "motivating environment" (using influence strategies and visionary leadership)
- coaching employees (both before and after assessment; to improve both strong and weak performance)
- assessing performance (both achievement of goals and behaviors used to get there)
- confronting poor performance
- reinforcing good performance
- modeling the behavior you want your staff to emulate

Successful leaders, this research suggests, build a "school climate" that encourages performance. The book's chapter entitled "Supporting Performance," goes into greater detail about creating such a climate. Some of the elements of climate that research has linked to high performance include:

- **Clarity** – The most effective organizations are very clear about the organization's mission and goals, as well as the goals and expectations for the individual staff members. Ideally, all of these should be clearly linked to show how employees' success supports the school's success. Both *defining* and *communicating* these goals are important parts of building clarity in your school.
- **High Standards** – Effective organizations set challenging but achievable goals. Setting goals that are *too easy* means staff time and energy that could be directed toward your school's primary mission will be directed elsewhere. Setting goals that are unachievable (or wrongly timed) may make staff give up. Setting appropriately high goals takes practice both in the *setting* and in *helping staff learn to identify and tackle barriers to success* (e.g., Which students are not performing? Why? What can be done?).
- **Responsibility** – Effective organizations clarify who is responsible for what, and they push decision-making as close to the "customer" as possible. In schools, that means that leaders must clarify what kinds of decisions teachers and other staff may make (alone or in teams), and push as much authority as makes sense for your school design to staff. The trap to avoid: it is debilitating when leaders tell staff that they have authority when they really do not. Fight your urge to hold onto decision-making authority about items that you have communicated to be in staff hands.
- **Flexibility/Conformity** – The fewer *unnecessary* rules, policies and procedures you have, the better. In an over-structured school, staff will feel that it is difficult for new ideas to gain acceptance and will stop offering their ideas to school leadership; new teachers will quickly learn to keep their ideas to themselves (since they won't get implemented anyway, with so much red tape). In contrast, if staff members feel they have flexibility about how to accomplish goals, they will experiment in areas where they have freedom and will help leadership find new ways to meet school goals. If a rule does not help you achieve your mission or if it does not have a legal/regulatory basis, scrap it. (Remember, though, that flexibility must be paired with clear goals and with the existing level of staff capacity to avoid chaos.)
- **Team Spirit** – The most effective organizations have fostered employees' feelings of pride in being affiliated with the school and their belief that everyone in the school is working towards a common objective. Ironically, a poorly executed move to "teams," i.e., one that forces staff to work in teams without actually having clear team goals, roles, work processes and team accountability, may actually hurt this dimension. You can go a

long way towards creating team spirit by strengthening clarity of goals and improving the process staff use to work together to achieve common goals.

- **Rewards** – The most effective organizations across industries tie rewards to performance in various ways. Rewards can include recognition, work opportunities, non-cash awards and pay. Rewards for performance can focus on the school, team or individual levels. Historical practices and the challenge of measuring the link between staff behavior and student achievement make discussion of rewards for school staff an emotional one. You should seek to ensure that rewards are used in a way that unifies around best practices rather than fractures around "super stars," and you should use rewards to support actively your other motivating efforts.

Leading a school to have such a climate is a daunting task indeed, one that requires a range of skills and competencies. This guide cannot possibly provide a primer on how you as a leader can go about developing those capabilities. The box entitled "Resources on Developing Leadership," however, provides some helpful references. As you seek to carry out some of the leadership tasks described in the remainder of this guide, these resources can help you identify your own leadership strengths, challenges, and strategies for improvement. The box called "Ways in Which School Leaders Can Facilitate a Motivating Climate" provides some ideas on the subject from Lorraine Monroe, a highly regarded school principal.

Resources on Developing Leadership

Assessment Tools

Organization Climate assessment materials you can use in your school are available through Hay/McBer Training Resources Group, 116 Huntington Avenue, Boston, MA 02116, 1-800-729-8074. http://trgmcber.haygroup.com/

Other Leadership Resources

Personnel Decisions International, *Successful Managers Handbook*, includes hundreds of practical suggestions for developing a wide array of leadership capabilities. For more information see http://www.personneldecisions.com/tools/sp/shop/

There are a variety of good books available on the topic of leadership:

Roland Barth. *Improving Schools From Within* (1990)
Warren Bennis. *On Becoming a Leader* (1989)
Ronald Heifetz. *Leadership Without Easy Answers*. (1994)
Jon R. Katzenbach and Douglas K. Smith. *The Wisdom of Teams: Creating the High Performance Organization*. (1992)
Peter Senge. *The Fifth Discipline, The Practice and Art of the Learning Organization*. (1990)
Thomas J. Sergiovanni. *Leadership for the Schoolhouse*. (1996)
Tracy Weiss and Franklin Hartle. Reengineering Performance Management. (1997).

Ways in Which School Leaders Can Facilitate a Motivating Climate

- Write out and make inspirational speeches. Let the staff and the public know who you are and what you stand for, what the organization's purpose and mission are, what your expectations are and what others can do together to make the mission happen.
- Articulate the mission statement often and passionately. When every you speak to staff, write memos, or issue bulletins, reiterate the mission statement.
- Develop a yearly theme that is consistent and connected to the school's mission. This is necessary to break the mission into doable, understandable segments.
- Be visible to the staff, students, to the parents, to all constituencies. Walk around. Be in the classrooms. Observe work in progress. Everyone needs to see the leader and know who he or she is and what his or her expectations are.
- Publicize successes and the celebration progress of individuals, groups, or a class. Recognize small wins as well as large one.
- Faithfully follow some activities that assure personal and professional renewal. Whatever it is for you -- a good book, a dinner out, a dance class whatever it is for you, you must do and encourage your staff to do the same.

From *Nothing's Impossible*, by Lorraine Monroe.

Recruiting and Selecting Staff

With your work towards creating the school's framework (mission, strategy, leadership, and governance), you have created the structure from which all activities will flow. As vital as this framework is, though, without people to live it out, your mission is simply a platitude, your strategic plan a piece of paper, your leadership/governance system an empty shell. Recruiting and selecting staff is the first step to ensuring your school operations support the school's purpose. It is your job as a school leader to decide whether your staff is going to be an instrument through which to achieve the mission, or an impediment with which to cope. In business terms, you must ensure that your staff is a source of "strategic advantage." As with all elements of building an organization, tapping your staff's strengths requires a well-thought out approach, beginning with your plan for recruitment.

Schools with vigorous recruiting campaigns do receive a large number of applications. For example, the Academy of the Pacific Rim (MA) received 500 applications for 2 positions and South Boston Harbor Academy (MA) received 800 applications for their opening year of 8-10 positions. Yet both schools said the number of truly viable candidates was low.[4] This suggests the need to develop a targeted recruitment plan. Such a plan might include the use of a task force of parents and board members to develop recruitment strategies and meet with local organizations and agencies. Or it might even include the use of a recruiting agency. These efforts may be more productive than sorting through hundreds of applications from individuals who are not well-matched with the school. Whatever recruiting assistance you use, a recruitment plan should answer What are we looking for? Where are we going to look? and How are we going to position ourselves for effective recruitment? The following suggestions will help you decide how to answer these questions.

Recruiting Steps

Preparation for recruiting is almost as important as the search itself. By preparing well, you can communicate your school's needs and help potential candidates identify themselves as good matches. You can take the first step in building *clarity and high standards* in your relationship with the staff members whom you ultimately hire. You also can begin to build *team spirit* by including your school mission with recruiting materials and by emphasizing common goals that people in each role are expected to help meet.

1. **Write a role description for each staff role**.
   To do this well, you must articulate the major work areas (classroom teaching, staff team work, parent relations, etc.), goals, and behavioral expectations/competencies for each role. Be sure to be as concrete as possible and to include any "extracurricular" duties (e.g., committee assignment, student groups/sports team supervision) generally expected of the position.

   Each staff goal should support your school's mission. Indeed, when creating role descriptions you should review your school's mission and goals and from these determine

[4] Interviews with school leaders.

what staff goals and behaviors are necessary for fulfilling the school's purpose. This will ensure that you define staff roles to be the engine of your school's success.

Finally, keep in mind that role descriptions should be created with input from multiple stakeholders. For example, though you may have a good idea of what you as a school leader want for that position, people who already occupy positions similar to that for which you're hiring may have a more detailed view of how those expectations translate into daily behaviors and required competencies.

Example of Staff Role Descriptions

The example below offers one sample excerpt from a role description. For more examples of job descriptions and qualifications from actual charter schools, see the online links included after Step 2 of this section.

In a school using a highly standardized approach to curriculum and pedagogy:

Example Work Areas	Example Goals	Example Expected Behaviors
Classroom Teaching	Ensure that all students achieve prescribed learning unit objectives in time allocated	♦ Adhere to structured materials
Staff Grade Team	Analyze and address individual student achievement problems, identifying both common and unique problems and customizing solutions	♦ Communicate new ideas openly in staff group ♦ Listen to others' ideas "undefensively" ♦ Contribute positively to group consensus on next steps ♦ Implement new approaches agreed in staff team

2. **Identify required and desired qualifications and characteristics**.
Pull directly from your role descriptions. Consider including a fourth role description column in the example above which lists qualifications and characteristics that support each goal. This will help you ensure that the qualifications you choose serve a real performance purpose.

A few general categories to consider include:

- subject matter knowledge
- instructional and assessment practices
- classroom management skills
- knowledge of child development
- awareness of typical issues facing the school's student body
- behavioral competencies (such as in teamwork and cooperation, goal-setting overcoming obstacles, and interpersonal influence skills)

Education and experience often are indicators of some of these, but focusing on these rather than the underlying knowledge, skills, and competencies may *exclude* some highly capable staff and *include* many who would not perform well in your school.

If you're not sure a qualification is required for strong performance on the job, consider listing it as "desired" rather than required. This expands the pool of people from whom you can recruit without compromising quality. Your flexibility to mimic this practice used in the private sector is a major advantage of charter school status in most states.

For additional help, the web is a good source for finding job descriptions placed by other charter schools. By clicking on the following links, you will find a few examples that might be helpful.

Resources for Teaching Position Descriptions:

You can access online applications for teaching positions and statements of desired qualities of teachers through the following websites:

http://www.uscharterschools.org/res_dir/res_primary/res_jobdescript.htm
http://www.pioneerinstitute.org/csrc/cshb/teacherjob1.cfm
http://www.pioneerinstitute.org/csrc/cshb/teacherjob2.cfm
http://www.pioneerinstitute.org/csrc/cshb/principal4.cfm

3. **Identify potential sources of staff**.
Include alternative sources, and think about how your efforts can generate interest in qualified people who might not otherwise think of teaching. Use your existing personal and professional networks heavily, and build on any new relationships quickly to create new recruiting sources.

Recruitment Ideas*	
Advertise in local classified ads	Attend or send materials to large conferences (e.g., ASCD, AERA) that have job associated job banks
Contact the career placement offices for both undergraduate and graduate programs	Work with other schools to participate in or host a job fair
Advertise in teacher magazines	Hold an open house at your school
Use the school, district, and/or state web site	Send announcements, maintain contacts with young professional organizations, alumni clubs, etc.
Try a recruiting agency	Encourage current teacher aides to get the necessary education and to apply for teaching positions
Connect with local charter school resource centers	Speak to high school groups to promote the position of teacher as a career possibility (obviously a longer term strategy)
Utilize board member contacts	
**Many of these ideas came from suggestions offered by charter schools in Massachusetts.*	

Related to the generalized effort to recruit excellent teachers is the question of specifically recruiting teacher of color. A 1999 study by the National Association of Independent Schools on the topic of attracting and retaining teachers of color helps clarify useful strategies for building a diverse teaching force.[5] This study contained three main strands: a survey of minority teachers, a survey of recruiting agencies, and an assessment of school characteristics most identified with diverse teaching staffs.

In the survey of minority teachers, respondents were asked what independent schools needed to do to recruit more teachers of color. They suggested that schools:

- contact colleges, particularly African American colleges
- target teachers of color through agencies and employment fairs
- advertise in "people of color" publications
- recruit at non-premier colleges
- recruit through churches and community centers
- send teachers of color (or other people of color from the school community) to do the recruiting
- use parents of color as a recruiting network

Other suggestions concerned the retention of teachers of color; respondents proposed that schools:

- reflect the goal of diversity in the school's mission statement
- create a clear plan to increase diversity
- offer professional support and mentoring to new teachers of color
- admit more students of color
- hire administrators of color
- include multicultural events in the curriculum
- offer racial sensitivity workshops for entire staffs (and boards)
- provide an inviting atmosphere

In the NAIS survey of recruitment agencies, respondents suggested that the independent schools were using "less than 50%" of the pool of qualified candidates. These agencies suggested more on campus recruiting, and much more extensive advertising. They described the qualities that make a school attractive to a candidate of color:

- diversity of the student body
- diversity of the faculty
- atmosphere/environment of the school
- school's commitment to diversity
- role of the faculty in decision making
- salary and benefits

Finally, in the school assessment segment of the study, researchers looked for features of the school that most strongly associated with higher percentage of teachers of color. These characteristics included:

- urban location
- relatively small school population
- "reasonable" percentage of people of color in the school and community population[6]

This study provides guidance for charter school leaders, particularly those in urban areas whose schools will serve a predominately minority population. It suggests that there are many more individuals of color who are interested in teaching and in teaching in a diverse, urban environment than are currently being hired by the independent schools. And it also suggests that those teachers currently working in independent schools might find a charter school a very attractive place to work.

4. **Promote your school**

The flip side of seeking out the best candidates is presenting your school so that the best and best-matched candidates are more likely to accept positions. It is important that candidates "get a feel" for your school so that they also may decide whether they will fit in. Some recruiting methods you might use to communicate and promote the purpose of your school include:

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[6] Pearl Rock Kane and Alfonso J. Orsini. "Attracting and Retaining Teachers of Color, "*National Association of Independent Schools Magazine*, Fall 1999. Access the study at http://www.nais.org/inform/magazine/fall/fall99/f99teacheroc.html

- giving all applicants a copy of the mission and/or other relevant materials
- leading all candidates on a tour of the school
- displaying student testimonials about the school
- offering candidates achievement, demographic, and other relevant information about the school
- distributing (with permission) the contact information of current teachers and parents who would be willing to answer finalist candidate questions
- allowing finalists to observe classes

5. Recruit!

Make sure that you keep track of where applicants learned about the opportunity so you can better focus future recruiting efforts. Also, don't forget about the important of long-term recruiting strategies. In order to find effective teachers in the future, K-12 schools should take an active role in working with institutions of higher education to produce strong teacher preparation programs and encouraging talented high school students to think about education as a career possibility. Also be sure to budget adequately for recruitment expenses – consider budgeting for costs associated with advertisement, mailings, and candidate travel.

Recruitment Resources

The Charter School of San Diego has posted its recruitment strategies and suggestions. Access these at: http://www.charterschool-sandiego.net/heart2.html

The steps Leadership High School took to recruit and hire teachers are described at: http://www.uscharterschools.org/pub/uscs_docs/ta/lhs_case5.htm#4.5

The National Teacher Recruitment Clearinghouse, at http://www.recruitingteachers.org is a new resource for prospective teachers seeking jobs -- and for school districts and states seeking qualified teachers. The site offers a gateway to job banks nationwide.

After you have determined how and where you will find candidates, you then need to figure out how you will choose the best candidate(s) for the job. The following steps outline a process of candidate selection.

Selection Steps

1. **Determine how you will screen candidates**.
You may screen for different characteristics in different ways. Education and experience cited can be checked through references. Content knowledge may be checked through testing, references, and indicators of educational achievement; interviews typically are not an effective way to check content knowledge unless extensive time is available. Competencies or behavioral characteristics may best be screened through interviews or on-the-job observation (if possible). Also consider any legal and regulatory restrictions on hiring that apply in your state. Though charter schools often have great flexibility in hiring, they are certainly not exempt from fair labor laws. Make sure you know the rules!

The interview may play an important role in your screening process. Consider using a behavioral method of interviewing to identify behavioral characteristics that meet your needs. This method requires candidates to describe in detail a time when they demonstrated a competency/behavior that you have identified as important for the role. Ask what the candidate did, said, thought and felt when they were working. Ask for an example from within the past 2 – 3 years so that the candidate can remember detail. Insist that the candidate be specific enough for you to evaluate how well they dealt with the situation. Do not accept later reflections on what the person should have done as evidence of their ability *actually* to perform (if this happens, ask for a more recent example when they used what they learned).

Example Behavioral Interview Question

Competency Desired:
Group Influence Skills

Interview Question:
Tell me a time when you convinced a group of people to learn or do something that you wanted them to learn or do. Describe the situation. What did you do and say (walk through step by step)? What were you thinking and feeling at the time? What was the outcome?

2. **Prepare materials and organize assistance** (e.g., other interviewers from your board).

Preparing Materials to Rate Candidates

Preparing the materials necessary to gain a fuller picture of the candidate involves two dimensions. First, you need to compile documents (such as the resume, cover letter, references, assessments from classroom observations, etc.) into a profile to be reviewed before interviewing the candidate.

Second, you should create or adopt some type of rating system that will allow you to assess and compare each candidate more objectively. This rating system should be based on the identified characteristics needed for the position. In Appendix B you will find a generic candidate assessment rubric that you may revise to fit your own needs.

In addition to preparing materials so that you might get to know and assess the candidate better, it is also a good idea to prepare materials that will allow the candidate to get to know the school better. Some suggestions for possible material to prepare were cited earlier in step 4 of the Recruiting section and include the mission statement, school brochure, school statistics, student testimonials, and contact information of teachers and parents willing to answer candidate questions.

Organizing Assistance

As a counterpart to determining what type of process (e.g., behavior interview) and what type of material (e.g., previous classroom assessments) you will be using, you also need to decide who is going to be involved in the selection process. Your school would probably be well-served by using a review panel composed of members who each bring different perspectives to the table. Such a panel might include the head of the school, board members, parents, other teachers, and students if appropriate.

3. **Make initial selections.**
Based on the candidate profile, classroom observation, interviewee assessment rubric, and/or selection panel recommendations, you should have the data you need to make an informed choice. Keep in mind that you may want to select new hires not only based on individual characteristics, but also on how those characteristics will contribute to the school as a whole. For example, if your school is just getting started, you may want to choose teachers who already have a few years of teaching experience and wait to bring on beginning teachers after establishing the school's own roots. Or you may want to choose many beginning teachers that will be open to the new philosophy and operations of your school. Staffing decisions will vary according to the individual vision of your school, but in general you should remember that if you want your teachers to work as a team you will need to consider how each hire will contribute as a team member when making selection decisions.

4. **Notify all candidates of outcomes**.
Use this communication opportunity to inspire selected candidates and get them excited about your unique school. Communicate offers in person by phone (with follow-up written offers). Clarify the role for which you are offering a job, compensation/benefits (see later section) and timing of the job (When does it start? Is it a 10 or 12 month schedule? etc.)

Hold borderline rejections until you know who has accepted your offers from your top choices. As soon as possible, consider communicating rejections to borderline candidates by phone (with follow-up letter). Be genuine in expressing concerns about their current

fit with your school's needs. You may find these candidates acceptable in the future, and your initial rejection may be the start of a future staff hiring! Consequently, keeping the files of borderline candidates may be a good idea for building up a future teaching/substitute pool.

Let all unsuccessful candidates know your decision in writing, and express your thanks for their trouble; letters need not be customized, just polite. This may seem overwhelming, but even a simple letter clarifying their status will leave them with respect for your school. Consider it a part of your public relations efforts.

5. **Draw up the contract.**
There are a number of good resources available to help you draft staff contracts. (See Resources for Contracts.) Because contracts will be legally binding, it is also a good idea to have attorneys examine any contract you draft. In general, some topics you may want to incorporate into a contract include: professional expectations and standards, duration of contract, work year, work day, salary, benefits, evaluation, days allotted for illness and personal needs, leaves of absence, termination stipulations, and grievance procedures[7]. For further advice about the legalities of employment, including a full checklist of issues to address in an employment contract, see the online guide to *Personnel Policies and Practices* at http://www.uscharterschools.org/gb/personnel/.

Resources for Contracts:

General Contract-writing Information
Leadership for Quality Education in Chicago offers several recommendations about writing a good and legal contract. (Also check the site for additional information about staff recruitment and selection, and staff roles, responsibilities, and key qualifications.)
http://www.lqe.org/Resource_Guide/go_organization.htm#Personnel Policies and Contracts

Sample Employment Contract
The Edison project offers a sample employment contract. View this at
http://www.aft.org/research/edisonproject/contract/employee.htm (Edison school)

[7] Based on a sample Edison School contract: www.aft.org/research/edisonproject/contract/employee.htm

Supporting Performance

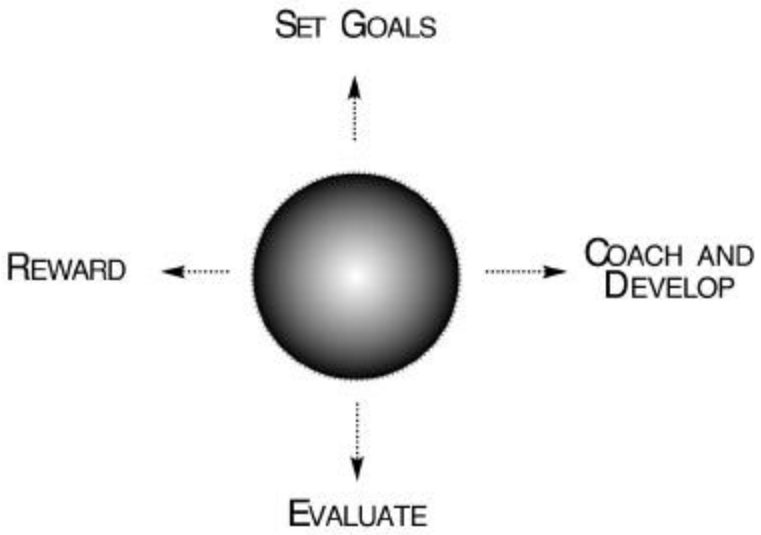
Managing staff performance is really about channeling staff time, talent and energy to support your school's mission and goals. If you have already clarified your school's goals, defined your staff roles accordingly, and recruited staff who can best perform in those roles, you have already gotten things going in the right direction. Now what?

This chapter proceeds in two main sections. The first section discusses "the performance cycle" — ways to use goal-setting, coaching and development, evaluation, and rewards to help your staff achieve results. The second discusses "building and sustaining the spirit," or how school leaders can create a culture that supports performance. Together, these two sets of activities make up the leader's "toolbox" when it comes to mobilizing and motivating the school's people.

The performance cycle

Supporting performance involves an interrelated set of activities, all designed to help your school's people achieve results that support the school's mission. One way to think about these activities is the following picture:

To see how this cycle works, start at the top. Begin by working with your staff to set goals — as individuals, as teams, or both. If the goals are ambitious, staff will need some coaching and development in order to achieve them — the next station on the circle. As people work to achieve their goals, move around the cycle — work with them to evaluate their progress. Pass through the final station, linking your school's rewards (pay, recognition, opportunities) to successful achievement of goals. And then begin again, setting new goals and starting the cycle anew.



Here are some ideas about each part of the cycle.

Setting goals

According to a study of American employee attitudes, only about half of employees say they understand how their organizations will assess their job performance.[8] Supporting performance needs to start with making expectations clear. Without clear expectations, it's difficult for staff to know where to focus their energies, how to improve, or whether they're doing a good job.

When thinking about setting goals and expectations, keep in mind these points:

- **Align individual and team goals with school goals.** To ensure that teachers and other staff are applying their energies in ways that help the school achieve its mission, work hard to align expectations for individuals and teams with the broad goals of the school. In part, doing so is a mechanical process of thinking through what each team or individual needs to accomplish for the school to meet its goals. For example, how much progress do Ms. Johnson's fourth graders need to make to contribute to the school's overall hopes for improvement? But alignment works best when everyone at the school has a general understanding of the school's broad goals and vision. Creating such a schoolwide understanding is the subject of the section "building the spirit." But the box "How School Leaders Can Communicate the School's Mission, Goals, and Expectations to Staff" contains some helpful tips.

Communicating the School's Mission, Goals, and Expectations to Staff

As familiar as you are with your school's mission and goals and with your expectations of staff, each staff person comes to your charter school with a lifetime of experiences that shape how he or she sees the world. To keep staff on the same path as your school, you must communicate your goals and expectations repeatedly. That means repeating the same things, in new and inspiring ways, and it means encouraging staff to find new ways of making the mission and goals more real in daily school life. Write it, say it, draw it, talk about it, improve it. Here are some concrete ideas:

- Focus on a particular school goal at each faculty meeting. You might do this by reviewing the benchmarks for the goal, outlining progress or highlighting particular efforts towards the goal, and/or asking teachers to speak about his/her ideas for and/or perceptions of the goal.
- Post the mission and school goals around the school and on school paraphernalia (t-shirts, mugs, letterhead, etc.).
- Provide professional development (e.g., training, coaching) around school goals and expectations.
- Base teacher evaluations (e.g., self, peer, and school head) in part on how the teacher is contributing to school mission and goals.

[8] Weiss and Hartle (1997), p. 66.

- Celebrate the reaching of benchmarks.
- Communicate mission and goals to parents so that they may also keep teachers focused on the school's vision.
- Model the behaviors you demand of your staff.

- **Set goals at all relevant levels of the school.** Every school is organized differently. Some have departments, others have teams, and so on. Whatever your school's organization, create a goal-setting framework that matches the school's structure. If your teachers are organized into grade-level teams, for example, set goals for each team, and then for each individual within each team. As you move "down" the structure, goals become more specific and tailored. For example, all teams in the school may share broad goals having to do with improving student achievement in the core subjects. But different grade levels may have different emphases or additional goals, depending upon unique challenges faced by the team. And within teams, different teachers may have different goals based on the challenges they face and the particular developmental needs they bring to school.

- **Consider multiple goals and measures.** It would be unusual to find a school where the expectations for a teacher's performance could be boiled down into a single goal or indicator. Performance for professionals is likely to involve a range of attributes, and your systems of goals should reflect the complex nature of the professional's job.

- **Make goals "SMART."** There are lots of catchy frameworks for thinking about what makes a goal or expectation a good one. Here's one such framework that may help you evaluate the expectations you currently have for staff, and set new ones. A goal is "SMART" if it is Specific, Measurable, Ambitious but Attainable, Relevant, and Time-based:

  Specific. Goals like "the teacher will contribute effectively to the school's curriculum planning process" aren't very helpful in guiding a teacher's decisions and activities. To be effective, expectations need to contain very specific ideas about what kinds of behavior and performance are valued.

  Measurable. Leaders and staff need ways of measuring whether a team or individual staff member is attaining each goal. "Measurable" does not necessarily mean "quantitative." But even qualitative attributes can be measured — not with simple scores on tests, but using rubrics that define different levels of performance. Creating

such rubrics is hard work, but without them, it's impossible for everyone to understand what constitutes high performance.

Ambitious but **A**ttainable. Setting goals requires striking a tough balance. On one hand, to spur improvement, goals must be ambitious, pressing staff toward higher performance. On the other, they must be attainable or staff will soon come to disregard them as "pie-in-the-sky."

Relevant. Think of relevance in two ways. One, noted above, is relevant to the school's broader goals. The other is relevance to each staff member's own professional development. Most people work harder to attain goals they find intrinsically valuable, and decades of research on educators makes clear that this generalization applies particularly to people working in schools.

Time-based. Goals should have a timeframe attached to them — a statement about when the goal should be achieved. This month? This semester? This year? Over the term of the charter? There's a place for all kinds of timeframes, but each goal should have one that makes sense.

- **Carefully structure the process of goal-setting.** The previous bullets may make it seem as if some group of leaders just gets together and sets goals, handing them down to staff. But to build buy-in, a more inclusive process usually makes sense. Ideally, construct a regular process by which goals are set each semester or year, with a predictable cycle of input and participation.

Coaching and Developing

Clear expectations can go along way toward helping staff succeed. But to meet ambitious expectations, most of us need help — most of us need "professional development." So the second station on the cycle of supporting performance is designing an effective program to build staff's capacity to meet goals.

Designing effective professional development is a substantial undertaking, and this guide can only scratch the surface of major issues you'll confront in the process. One resource to consider is a document called *Professional Development: Learning from the Best*. Based on the experiences of schools across the country that have won awards for their professional development, this "toolkit" sets out a step-by-step process that schools can use to design, implement, and evaluate professional development. You can find the toolkit online — see the Resources for Professional Development box.

While your program will be unique there are some characteristics of successful professional development programs (as described in *Professional Development: Learning from the Best*) that you may wish to consider as you plan:

1. Successful professional development programs include the people most directly affected by the professional development in the design of the program. Teachers can organize and take charge of their own learning. They can create professional

communities and allocate resources to support their work: the results are considered more valuable by the faculty than individual workshops or one time events.

2. Successful programs are carefully planned to assure that the needs and goals of the school and the needs and goals of individual teachers are both reflected in the professional development plan.
3. Successful programs probe beyond symptoms of school issues and through various needs assessment processes define critical issues for investigation and learning, based on documented gaps between goals and reality.
4. Successful programs develop "learning communities" where teachers are linked to current research and where they extend their knowledge and often take on new leadership responsibilities in the school.
5. Successful programs are built into the life of the school and into teacher practice and engage in on going evaluation of the process.

Types of Professional Development and Support

- ✓ Customized individual development plans
- ✓ Mentoring/peer coaching
- ✓ Common planning time
- ✓ Study groups
- ✓ Workshops, conferences
- ✓ Graduate classes
- ✓ Teacher "externships" in which teachers work in the public, private, or nonprofit sector to gain insight into what skills today's students will need for tomorrow's careers.
- ✓ Ongoing teacher networking across the school and with other schools
- ✓ Sharing of research articles
- ✓ Videotaping and watching a class session
- ✓ Action research projects in which teachers identify a topic (e.g., the effectiveness of cooperative learning) and examine it in his/her classroom
- ✓ Observation by school head or peers with feedback

There is perhaps one key idea to keep in mind concerning professional development: professional development is not solely or even primarily about the 2-day workshops teachers might attend every year. Professional development is about the ongoing learning and support system whose components might include everything from the two-day workshops to cross-curricular team planning to Outward Bound experiences.

The importance of this idea is evidenced in a study conducted by Beverly Showers, Carlene Murphy, and Bruce Joyce.[9] In this study, the researchers examined three schools that systematically instructed teachers in recognized teaching strategies in a three phase process that included giving teachers a solid theoretically understanding of the strategies, multiple demonstrations of the strategies in action, and opportunities to practice the skills in a workshop setting. Despite the relatively intense nature of the training, of those teachers than received no additional support once back in the classroom, fewer than 10 percent integrated the new strategies into their teaching repertoire. The researchers maintain that true integration of these new skills requires 20-30 trials under classroom conditions. They also encouraged the teachers to use the strategies as soon as they got back to the classroom and to continue using them regularly. Further, they asked the teachers to organize themselves into study teams for sharing, observing, and peer coaching. Using this method, 88% of the teachers effectively and regularly used the strategies. And this had very real impact on student achievement, the ultimate goal of professional development. In one school, student promotion rates dramatically increased, while

[9] Showers, Beverly; Carlene Murphy, and Bruce Joyce. "The River City Program: Staff Development Becomes School Improvement." In Learning Experiences in School Renewal: An Exploration of Five Successful Programs, 1996.

the average achievement test score increased from the 25th to the 42 percentile and the disciplinary referrals dropped to about 1/5 their previous level.

As demonstrated by the aforementioned study, professional learning and growth can certainly take place in the short-term sessions that are the hallmark of traditional professional development, but in order to maintain that learning over the long-term, long-term support is also needed. Ideally, staff development sessions should be bolstered by:

- asking teachers to reflect actively on what has been learned and to make concrete plans on how s/he will use it in the classroom
- asking teachers to evaluate the sessions and using these evaluations to make changes in the sessions
- facilitating a network of support through peer coaching, journaling, group sharing, and the like to provide an environment conducive to the use of new skills
- evaluating teachers in part on if and how they use the skills gained in professional development sessions in the classroom
- measuring the impact of new teacher skills on student achievement

Short-term sessions are one way to help teachers improve their teaching, but as a charter school, your school has a wonderful opportunity to break out of the "workshop mentality." Professional development can be anything that helps teachers teach better so that students can learn better. Whether it's group study or group yoga, use your freedom to view professional development in a new light. In looking at the bottom line, staff development need not be thought of in terms of a "days allotted" but in "results gained." *That* should be the guiding criterion for professional development.

Resources for Professional Development

The **National Staff Development Council Standards for Staff Development** has established national standards aimed at giving schools, districts and states direction in what constitutes quality staff development for all educators to address these needs. The organization's online site offers a complete list of standards, and a self-assessment and planning tool.
www.nsdc.org/standards.htm

The **North Central Regional Education Lab (NCREL) Professional Development** *site* offers a compendium of resources about professional development (planning, needs assessment, funding, model programs, etc.). The site is designed for school and district-level teachers, administrators, and others interested in improving professional development.*: Staff Learning for Student Results*
A web-based compendium of resources about professional development
www.ncrel.org/pd

The North Central Regional Education Lab (NCREL) Professional Development site also offers a **toolkit, *Learning from the Best***, for schools and districts based on the national awards program for professional development. Information about developing and implementing professional development programs, evaluating programs, sharing professional development learning, and a variety of online tools is available at:
www.ncrel.org/pd/toolkit.htm

Evaluating

Evaluating, improving and rewarding your school and its staff are critical parts of creating a motivating, high-performance climate. Good performers in organizations of all kinds find it motivating both to hear what they are doing well and to learn how they can improve (See Reengineering Performance Management, 1997).

Staff members who are committed to their own and school success will be hungry for any information that helps them understand how they can keep doing better and better. A well-designed evaluation process and appropriate reward system can help you feed the natural desire of committed staff to succeed.

Evaluating staff should have two major purposes: (1) to fuel ongoing changes in teaching practices and staff development and (2) to allocate rewards of various kinds. Both of these are potentially motivating activities, as they can help channel staff efforts in ways that better meet school goals. Rewards are discussed in the next section.

Your evaluation process should begin with your school mission and goals and individual staff role expectations. You then must seek ways of *measuring* how your school, teams and individual staff members have contributed to meeting goals and expectations. The best

evaluation processes address both measures of achievement (to what extent have we met goals?) and underlying causes (why?).

Professional Development: Learning from the Best (North Central Regional Educational Laboratory, 1999) summarizes key points in an evaluation process.

1. Start with your school and staff goals and expectations.
2. Try to measure both *results* (what has been achieved?) and how well different school activities contribute to school results (why?). (This is referred to as summative and formative evaluation, respectively.) Use results to help teachers devise and implement changes in the way they work.
3. Frequent evaluation that can be used to improve the school throughout the year is best; but regular, e.g., annual, less frequent evaluation can be useful for making sweeping improvements.
4. When planning school and staff evaluation, consider both the content and process for your evaluations, including:
   - the school or staff goal,
   - the activities used to meet the goal,
   - multiple measures you can use to assess achievement of the goal and underlying causes,
   - sources of data and methods for gathering data,
   - who is responsible for gathering and analyzing evaluation data, and
   - who will communicate results and lead improvement planning.

Sources for Teacher Evaluation Profile

- ✓ Announced observations by school head with opportunity before the observation to discuss the lesson and areas to assess as well as opportunity after the observation to review the assessment
- ✓ Parent assessment of teacher
- ✓ Unannounced observation by school head with opportunity after the observation to review the assessment
- ✓ Student assessment (if appropriate) of teacher
- ✓ Announced and unannounced observations by peer with opportunity for preview and/or review of assessment
- ✓ Value-added* student achievement measures
- ✓ Self assessment based on personal and school goals
- ✓ School leader review of other teacher duties and expectations (e.g., school policy implementation, commitment to professional development, interaction with others, committee membership, etc.

* *"Value added" refers to measures of student achievement that take into account the "starting point" for the students; they look at growth in scores.*

For some additional ideas about evaluating staff, including some sample approaches from real schools, see the box entitled "Resources for Evaluation." Additionally, Appendix C: Classroom Observation Form, may also help you with one aspect of teacher evaluation.

Resources for Evaluation

Two charter schools have made available **sample forms for faculty evaluation**. Access these online at:
http://www.pioneerinstitute.org/csrc/cshb/evaluation1.cfm (Neighborhood House CS)
http://www.pioneerinstitute.org/csrc/cshb/evaluation2.cfm (Lynn CS)

The School of Medicine at UCLA offers a **good staff appraisal form**. While it is not from a charter school, the form does offer ideas and information which could be applied to the charter school setting.
http://www.crump.ucla.edu/crump/tsama/forms/dpssamp.doc

The Northwest Regional Education Laboratory offers a **sample schedule of evaluation, a sample evaluation form, and a protocol for observation**. These three online tools can be accessed in NWREL's online Charter Starters Leadership Training Workbook 4 at http://www.nwrel.org/charter/Workbook/cs_workbook4.pdf

SERVE's *Designing Teacher Evaluation Programs that Support Professional Growth* is a helpful publication you can order from: http://www.serve.org/publications/rdtes2.htm or call (800) 352-6001

Rewarding

Rewards reinforce and guide behavior whether you want them to or not. For example, *not* using rewards to discriminate between high and low performance (at a school, team or individual level) reinforces the message that performance does not matter. Not surprisingly, research has shown that high-performing organizations are more likely to use rewards that discriminate between high and low performance than are average performing organizations (Reengineering Performance Management, 1997).

Many school administrators have shunned even the discussion of alternatives to traditional lockstep base pay, because they have made three simple assumptions: that the only alternative is (1) *individual* teacher (2) *cash* incentive pay for (3) raw *student achievement scores alone*. An incentive compensation program structured entirely this way would reinforce solitary teaching with no incentive to share good ideas among peers, and it would reward teachers in schools with students who already perform well on achievement tests. That's why rewards must be designed carefully to reinforce the behaviors and results that *reflect your school's mission, goals and work process*. The challenge is no more difficult than the task of rewarding staff appropriately in other kinds of organizations, just more politically charged.

Though most charter schools across the country have adopted traditional rewards systems, many others have taken advantage of the opportunity to experiment with new options. For an example of one school's approach, see the box "Setting Rewards at St. Paul Family Learning Center." This example illustrates the idea of a reward system linked intimately to a school's overall vision and culture.

Setting Rewards at St. Paul Family Learning Center

The St. Paul Family Learning Center's rewards system breaks the mold — but it also shatters the caricature of "merit pay" that leads many educators to think performance-based pay can't work in schools. The key to the approach is that it specifically rewards skills, behaviors, and outcomes that support the school's culture and contribute to the achievement of its mission.

The seven "skill areas" rewarded in the pay system are:

- Advisor (being an advocate, guide, personal learning coach to a group of students)
- Facilitator (using instructional processes that impact all students)
- Technology (facility with various kinds of technology for learning)
- Assessor (ability to use multiple means of evaluating student progress)
- Networker (obtains ideas, programs, resources from various sources to augment program)
- Learning results (success at obtaining student learning with all students)
- Supervisory (managing adults)
- Program development (contributing to the continuous improvement of the school)

The school's leaders place each staff member on a four-point scale on each of the skill areas: new on the job (level 1), initial demonstration of skill (level 2), demonstrated proficiency (level 3), or expert, in demand to teach others (level 4). Staff members earn extra pay increments for moving up the scale within a skill area. According to a write-up of the school's system posted on the Internet (http://www.uscharterschools.org/pub/uscs_docs/sd/perf_pay.htm), attaining level 2 as an Advisor yields a salary increase of $500. Level 3 adds $1,000, and level 4 adds another $1,000. A staff member who attains Level 4 in all areas earns $17,000 in additional compensation. (These precise numbers may be out-of-date, but they provide an illustration of the sort of system in use at Family Learning Center).

The system retains some elements of the traditional school pay structure. For example, staff members with masters degrees earn extra pay, as do teaching assistants who have completed some college. But the use of attainment in "skill areas" rather than years of experience sets the school's system apart.

Consider the basics offered here, and you will be a long way down the road towards using rewards to reinforce your goals. Considering alternative pay (even if you do not adopt it right away) can help you clarify and improve your performance expectations for new and existing staff. In addition to using this framework to help devise your plans, have a look at some of the examples and resources emerging from places around the country that are beginning to experiment with alternative forms of compensation — in the box "Resources on Rewards."

Basic Steps to Develop Your School's Staff Rewards

1. **Articulate your *philosophy* of compensation.**

Your compensation philosophy tells staff and others what assumptions and principles your school will use for determining rewards. A good philosophy also tells how compensation

supports the mission (or at least makes an affirmative statement that rewards *will* support the mission!).

Consider the questions below. You may need to come back to them after you have considered some of the more technical issues.

- What do you want to pay for (e.g., effort, performance, loyalty)?
- What kinds of rewards do you offer?
- What is the purpose of each kind of reward you will offer?
- How do you want pay, and other rewards, to support your mission?
- What other assumptions are you making about staff rewards at your school?
- What principles will you use to make pay decisions?

2. **Decide what *elements* of rewards/compensation you need and feel comfortable implementing**. Consider those below and note the typical reasons for using each kind.

♦ Benefits (insurance, vacation, holidays) – these are the rewards for "membership" in your school, for being part of the team. Both by law and traditional practice, benefits are used to reward loyalty, not performance or position. They are typically offered to all employees of an organization (sometimes with a waiting period for certain benefits, and often limited to employees who work half-time or more).

♦ Base Salaries and Wages – This basic element of most reward packages compensates employees for bringing relevant skills and competencies to the job and using them to perform in their defined roles at an acceptable level consistently over time. Wages and salaries differ (although poor management can undo the potential benefits of either!). Wages tend to reinforce a focus on time spent, and tend to encourage employees to "stick to their knitting." Salaries tend to reinforce a focus on the employee's "total job," including both the major elements and other contributions to the organization as a whole. Well-designed base pay will consider:

- The total amount of base pay available to staff members in relation to their expected individual contributions to the school and the reasons (complexity of the role/job, the individual's likely value/contribution to the school, competitors' pay, consistency within the school; minimum and maximums for the range of pay in each role/job). Many organization develop pay grades or bands that cluster similarly complex (and similarly compensated) roles together. Make sure that you consider multiple indicators of competitor pay if you are recruiting staff who might have alternatives other than other local public schools.
- The process for making pay increases, including: overall pay increase budget and funding; reasons for pay increases for individuals (e.g., performance/contributions, competitiveness of current pay with other employers, consistency of pay for people in similar roles); timing of pay increases; keeping employee base pay in the minimum/maximum range; communication about pay increases.
- Whole-year versus school-year pay.

- Variable Pay – Pay that varies with performance tends to *reinforce variable or discretionary* behaviors. Well-designed variable pay will reward outcomes and behaviors:
  - that employees can influence
  - that support the school's mission, goals and work process
  - measured in a way that everyone can understand
  - that are not destructive to other goals, work processes or the mission of the school
  - over a time period that makes sense for the school's operations
  - that lead to funding for variable pay

  There are some technical issues to consider, each of which affects how you motivate staff:

  Well-designed variable pay often includes minimum, target and maximum performance levels that will be rewarded and pairs each of these performance levels with a dollar payout (or a percentage of base salary payout). If you decide to introduce variable pay, you will need to consider both performance levels and the payouts associated with each.

  A corollary issue is whether payouts will be flat dollar amounts or percentages of base pay. Flat dollar amounts reward all employees receiving the reward without regard to differing base pay levels; this is appropriate when performance contributions rewarded with variable pay are unlikely to be different for people with different base pay. Payouts made as a percentage of base pay (e.g., 10% of annual base pay) tend to reinforce the underlying reasons for different base pay levels as well as the variable pay performance factors. You can make a determination about which makes sense for your school's pay.

  Finally, variable rewards can be targeted at all school staff, teams, individuals, or a combination of these. Consider your real performance expectations and work processes. Now use pay to reinforce what is important, without harming the rest of performance. Many organizations use whole-organization performance factors (e.g. for charter schools: school enrollment) to *fund* variable pay, and team and/or individual performance to determine what each individual receives. You might consider critical whole-school financial and performance factors as "circuit breakers" that are necessary before any team or individual receives variable pay; this will keep whole-school performance issues in the fore.

- Recognition and Non-cash Awards – These also tell staff much about what is important to the school's mission and goals. Consider the large number of organizations (many now defunct or dying) that used lockstep base pay and a gold watch at 30 years as the reward system. These employers reinforced loyalty over performance, which was fine in world with little competition. But when performance determines whether your school will live or die, you should consider using recognition and non-cash awards to highlight performance strengths.

Often these rewards are the most visible ones within a school, so ensure that you are following the variable pay checklist above, even when the rewards are small. Examples

include: opportunities to attend special professional development events; being able to act as "guinea pig" for new approaches in the school; team celebrations for achieving short-term performance goals as a team. Avoid awards that dilute the meaning of the award (e.g., employee of the month – how many employees do you really have in one charter school?) or that are contrary to your work process (e.g., individual recognized publicly for a team accomplishment).

3. **Decide who will make and communicate reward decisions**.

Nontraditional reward systems often require someone to make decision about the compensation that individuals, teams, or the staff as a whole will receive in a given year. If raises in base pay can range from x to y percent, who determines what raise each teacher gets? If variable pay depends in part on a judgment about progress made by a teacher, who makes the judgment? As discussed above, the best rewards systems make these decision-making processes as systematic as possible. But someone must make the final decision. Who that "someone" is will vary from school to school depending upon the school's broader leadership and governance structure. It could be an individual or a group. Whoever makes the decision, though, needs to have broader budgeting authority so that they can consider the school-wide financial impact of rewards decisions. Perhaps most important is that it is clear in advance to everyone concerned who will make decisions, and on what timetable.

Once decisions have been made, communicating them to staff is also of vital importance. Again, approaches to communicating rewards decisions should mesh with the broader norms of communication within the school. If the principal has an annual meeting with each teacher to sum up the year's work, for example, that meeting might be the ideal time to talk about next year's compensation.

4. **Develop tools and materials to record your decisions and ensure a consistent and clear pay process**.

Nothing undermines a rewards system more effectively than suspicions on the part of staff that the system is unfair or inconsistent. Any move away from a traditional seniority-and-experience salary scale can prompt such suspicions, since teachers with the same levels of seniority and experience may end up with different reward packages. But worries can be minimized if the system is clearly spelled out in advance (in writing), explained to staff as part of the hiring process, and documented carefully on an ongoing basis. If a staff member's pay is determined according to a complex set of factors, creating some kind of worksheet that explains the calculation explicitly can help. Distributing blank versions of the worksheet up-front, at the beginning of the period that will form the basis for pay determination, raises confidence that the process will treat staff fairly. Changes in the structure need to be openly discussed in the development phase and then communicated clearly once they are made.

None of these measures will ensure that staff buy into a non-traditional pay system. But gathering wide input, devising a pay system that aligns with the school's broader culture and decision-making processes, communicating the system clearly, and maintaining consistency over time can go along way toward creating a system that is accepted or, better yet, valued by staff.

Resources on Rewards

Access the Online Chapter

www.uscharterschools.org/gb/motivatingstaff3.htm

General websites with information about compensation in education

The Teacher Pay and Incentives section of the Teacher Quality Clearinghouse, a project of the Thomas B. Fordham Foundation and the Educational Leaders Council contains discussions of teacher pay issues and links to news items and research about pay systems around the country.
http://www.tqclearinghouse.org/issues/pay.html

The Teacher Compensation Project of the Consortium of Policy Research in Education. provides numerous research reports on new ways of compensating teachers.
http://www.wcer.wisc.edu/cpre/teachercomp/PROJECT/aboutcpre.HTM

Other information about compensation in education

"The Pros and Cons of Performance-Based Compensation," by Lewis Solmon and Michael Podgursky, Milken Family Foundation, 2000.
http://www.mff.org/publications/publications.taf?page=284

"Pay for Performance: An Issue Brief for Business Leaders," Business Roundtable and National Alliance of Business, 2000.
http://www.nab.com/content/educationimprovement/teacherquality/PFP.htm

Building and Sustaining School Spirit

Staff emotional state greatly affects the discretionary effort staff members contribute to the school. Both leadership actions and the reality of daily life have the potential to make or break your staff's spirit. This section first looks at the factors that contribute to a motivational environment based on studies from a wide variety of organizations. It then address both actions you can take *personally* as a leader and how you can arrange the *space* teachers experience daily to create a positive physical space and emotional state for staff, teachers, and others in your school.

Motivational factors

In reflecting upon how to build school spirit, it is interesting to note that organizational factors that contribute to job satisfaction may be distinct from factors that contribute to job dissatisfaction. In an article in the Harvard Business Review, Frederick Herzberg outlines both types of factors based on a number of studies conducted in a cross-section of organizations and with a broad range of employees.[10] These studies suggest that factors responsible for job satisfaction include:

- achievement
- recognition for achievement
- the work itself
- responsibility
- growth or advancement

Factors responsible for job dissatisfaction include:

- company policy and administration
- supervision
- interpersonal relationships
- working conditions
- salary
- status
- security

This distinction between job satisfaction and job dissatisfaction factors suggests that measures you would adopt to keep staff happy are not necessarily the same ones you would adopt to keep staff from being unhappy. Thus, you must assess the status of the "spirit" at your school. If your main objective at this point is either to encourage people to join or to keep people from leaving, it might be wise first to concentrate on factors of job dissatisfaction such as salary and working conditions. If, on the other hand, turn-over is not high and morale not low, it might be better to focus on issues of job satisfaction--for example, by creating a sense of achievement and

[10] Frederick Herzberg. "One More Time: How Do You Motivate Employees?" *Harvard Business Review*. September-October 1987: 109-120.

increasing the levels of responsibility, rather than focusing on salary, status, and other job dissatisfaction factors.

Building a common routine

Part of design work includes creating a common routine by which your school will operate. This may involve bridging the curriculum across subjects and grades, arranging the class schedule, connecting teachers through professional development and support, and implementing school-wide events. All of these are ways of interweaving all of the school's operations into a unified vision, as well as creating the rhythm and building the traditions of the school year. Since routine affects the whole education community, consider involving both student and staff input in creating common schedules.

Examples of Creating Routine

- ✓ Begin each morning with a class meeting.
- ✓ Sponsor a food drive every Thanksgiving.
- ✓ Institute assignment notebooks/packets for younger students so that parents will always be aware of and have to "sign off" on homework.
- ✓ Have students conduct school tours for visitors.
- ✓ Have a school-wide assembly once a month.
- ✓ Host an annual open house.
- ✓ Designate an advising teacher/staff member for each student so that students may have an adult to talk to and parents have a main contact person.
- ✓ Hold an annual awards convocation.

Implementing and enforcing school-wide rules

There is no faster way to demoralize teachers than to fail to create and enforce a reasonable set of school rules. Dr. Lorraine Monroe, the legendary principal of the Frederick Douglass Academy in Harlem calls these rules, related to behavioral issues such as attendance, respect for property, and preparation , the "NON NEGOTIABLES." Created by Dr. Monroe and her faculty before the Academy was opened, they became the absolutes—known to all students and enforced conscientiously. Urban principals interviewed for this project said repeatedly that you must remove from the learning space those students who are breaking the rules.[11] It seems very basic but it is an enormous task when students have been in other school environments where rules were lax or not enforced at all. Principals said that the number of suspensions and suspension meetings with parents can seem overwhelming in the first year of a school. But, they also said that by mid-way through the first year, things settle down and students begin to integrate the rules into their behaviors.

[11] One caution: you will need to be sure that your non-negotiable rules are aligned with applicable state and local regulations regarding student behavior.

In order to forge this structure into the school's environment, you must identify, teach, and model your expectations for the ways students and teachers will relate to each other on a daily basis. This may require explicit instruction in social skills. If so, take the time early in the school year to define, explain and practice the type of interactions you wish to see. There are several excellent sources for this curriculum.[12] Teachers can reinforce these patterns in their classrooms but to be effective they must emanate from the culture of the entire school. One school has labeled these activities building the "culture of encouragement" and reminds teachers and students every year that "by supporting each other, we all become more than we imagined possible".[13]

Planning physical space

As a leader you must design the space that encourages learning to happen. How does a school leader design such space in the school and help teachers create such space in their classrooms? In *To Know As We Are Known*, Parker Palmer describes what he considers the three critical characteristics of learning space.[14] For him such space is open, bounded, and hospitable. Openness is the common sense meaning of removing impediments to learning that we find around and within us, to set aside the barriers behind which we hide. For Palmer, 'the openness of a space is created by the firmness of its boundaries". A space without boundaries does not invite learning but instead is an invitation for confusion and chaos. When boundaries are violated, the quality of the space is destroyed. Teachers must defend boundaries with care. And the school leaders must create a set of boundaries for the entire school. And "precisely because a learning space can be a challenging, even painful place, it must have one other characteristic—hospitality". [15] Hospitality means supporting others as they try to learn but it also means being hospitable to new ideas, to the strangeness, wonder, and often unsettled feelings that arise as one learns new and different ideas. The idea of hospitality, at first a gracious gesture, becomes central to learning: hospitality for what it can allow, encourage, and yield.

Charter schools face significant challenges in locating and renovating space. Often the facilities that are identified pose huge challenges. One school began by leasing space in a shopping mall and as small business tenants moved on, the school expanded by renting more space.[16] But not all the space was continuous. Certainly a challenge, but inside the school, you felt immediately that in this space learning was occurring. So, as a school leader you need to think a great deal about physical space and how its design conveys a message about how students learn, how teachers work, and how a group of individuals becomes a community. Don't try to do the design work by yourself. This is the time to ask for help: architects, builders, construction managers can all be useful.

[12] Pamela Seigle, Reach Out to Schools, Social Competency Curriculum
[13] Health Careers Academy, Boston
[14] Parker Palmer. *To Know As We Are Known: Education As a Spiritual Journey*. (1993)
[15] IBID, p 71
[16] Cape Cod Lighthouse Charter School, Orleans, MA.

Conclusion

Mobilizing and motivating people to achieve results is one of the principal imperatives of any school — indeed of any organization. For charter schools especially, meeting this imperative presents both great challenges and great opportunities. It presents great challenges because charter schools are often on their own, starting from scratch without the traditional routines and systems that district schools use. They must invent their own approaches to finding the right staff, organizing them effectively, supporting their performance, and fostering a work culture that produces results. Inventing these approaches takes expertise, commitment, and creativity.

But charter schools also face a compelling opportunity to do things differently when it comes to mobilizing and motivating staff, just as they do when it comes to teaching and learning. The authors hope this guidebook will help charter schools make the most of that opportunity. But the hard work of helping people achieve their best ultimately happens not on the pages of a guidebook, but in the schools themselves. This hard work starts with the building blocks of mission, strategy and governance. It moves from there to creating the major systems of people-management discussed in this publication — recruitment and selection, setting goals, coaching and development, evaluation, and rewards. It comes together in the culture the school creates, the ways of working together that make the school a unique place to be employed, and to be educated. And — if it's successful — the hard work pays off in what matters most — improved learning for children.

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Appendix A: Guiding Questions for Mission and Strategic Planning

You may use this tool to help you think about the usefulness of your mission statement and strategic plan. Check the box that best describes how well your mission statement or strategic plan meets each criterion.

Guiding Criteria: Mission	**Fully Meets**	**Partially Meets**	**Does not Meet**	**Notes**
Our mission statement is clear and concise.				
Our mission statement is operational. In other words, it guides us in knowing what actions our school should perform.				
Our mission statement sets concrete boundaries so that we have a good sense of what is outside the scope of our work.				
Our mission statement provides a concrete sense of the school's purpose to potential external supporters.				
Our mission statement motivates and unifies staff around a central purpose.				
Our mission statement serves to direct our evaluation strategy, i.e., we will know what outcomes we want to measure when we read our mission statement.				

Guiding Criteria: Strategic Plan	**Fully Meets**	**Partially Meets**	**Does Not Meet**	**Notes**
Our strategic plan is the result of the effort and vision of multiple, varied stakeholders.				
Our strategic plan is realistic.				
We have established priorities within our strategic plan.				
The actions outlined in our strategic plan are coordinated with one another around the school's mission.				
Our strategic plan designates responsible parties for respective actions.				
Our strategic plan includes benchmarks to let us know if we are meeting interim goals.				
Our strategic plan includes a review process to assess whether the plan is still on track.				

Appendix B: Candidate Rubric

Directions: Using the rubric listed below, rate each job applicant along the different dimensions that might characterize good teaching. In the "weight" column, you may choose to multiply any variable that you feel is of special importance. For example, you may think that previous teaching experience is more important than many other variables, so you would weight it more. (See the example below.) For most categories, you will probably not need to add in any special weighting strategy. In the "notes" section, you may want to record what your school is looking for versus what the candidate possesses, what evidence you used to give a ranking, or any other pertinent information that will help you in your hiring decision. Feel free to revise the tool according to your school's own needs.

Rubric
4—This candidate fully meets the qualification for which we are looking.
3—This candidate mostly meets the qualification for which we are looking.
2—The candidate somewhat meets the qualification for which we are looking.
1—The candidate does not meet the qualification for which we are looking.
NA—We are not looking for this particular characteristic.
ND—We were not able to determine a rating on this characteristic.

Possible Sources of Evidence for Rating

- Resume
- References
- Observation/Video of Teacher in Action
- General Interview
- Behavioral Interview
- Teaching Portfolio
- Applicant's own written/verbal statement of teaching/learning philosophy

Category	**Notes**	**Rating**	**Weight**	**Subscore (rating X weight)**
Teaching Experience	We want someone with 3 years or more teaching experience. This candidate has 2 years experience according to her resume.	1 2 3 4 NA ND	1.5	4.5

Position Sought: _____
Candidate: _____
Date: _____
Rater: _____
Total Score: _____

Category	**Notes**	**Rating**	**Weight**	**Subscore (rating X weight)**
Teaching Experience		1 2 3 4 NA ND		
Other relevant experience (e.g., working with youth)		1 2 3 4 NA ND		
Education (e.g., degree, quality of teaching program, etc.)		1 2 3 4 NA ND		
Certification/ other endorsements: _____		1 2 3 4 NA ND		
Demonstration of prior involvement/ commitment to school activities (e.g., coaching, sponsoring student groups, etc.)				
Willingness/ability to adopt school's model/ philosophy		1 2 3 4 NA ND		
Ability to interact with students		1 2 3 4 NA ND		

Ability to interact with other teachers		1 2 3 4 NA ND		
Ability to interact with parents		1 2 3 4 NA ND		
Specific instructional and assessment skills (list if applicable) _____ _____		1 2 3 4 NA ND		
Specific classroom management skills (list if applicable) _____ _____		1 2 3 4 NA ND		
Willingness to take on other responsibilities		1 2 3 4 NA ND		
Ability to deal with conflict		1 2 3 4 NA ND		
Sense of humor		1 2 3 4 NA ND		
Ability to maintain order in classroom		1 2 3 4 NA ND		
Creativity		1 2 3 4 NA ND		

Resourcefulness		1 2 3 4 NA ND		
Commitment to remain at our school for ___ (length of time)		1 2 3 4 NA ND		
Awareness of education research/policy		1 2 3 4 NA ND		
Other		1 2 3 4 NA ND		
Other		1 2 3 4 NA ND		
				Total Score _____

Appendix C: Classroom Observation of Teachers

Directions: This tool may be used for classroom observation of teachers. It works best as part of an overall observation plan that includes an opportunity for the teacher and observer to meet before the observation to lay out what areas are in special need of observation as well as after the observation to discuss what was observed.

Teacher being observed: _____
Name and title of person performing observation: _____
Date of pre-observation discussion: _____
Date of observation: _____
Date of post-observation discussion: _____

Rubric
5—This objective is fully met; no significant improvement is needed.
4—This objective is mostly met; only slight improvement is needed.
3—This objective is partially met; some improvement is needed.
2—This objective is met to a limited degree; a good deal of improvement is needed.
1—This objective is not met; comprehensive improvement is needed.
UO—Evidence for this objective was not observed.

Category	**Rating**	**Notes/Comments**
Teaching and Learning		
Area identified in pre-observation discussion: _____ _____	1 2 3 4 5 UO	
Area identified in pre-observation discussion: _____ _____	1 2 3 4 5 UO	
The teacher has effectively implemented appropriate instructional strategies.	1 2 3 4 5 UO	
Students are on task throughout the lesson.	1 2 3 4 5 UO	
Student work is individualized to the appropriate degree.	1 2 3 4 5 UO	

Category	**Rating**	**Notes/Comments**
The teacher uses an appropriate level of questioning during class discussion.	1 2 3 4 5 UO	
Students actively participant in class discussion.	1 2 3 4 5 UO	
Students demonstrate that knowledge/skills have been gained by the end of the lesson.	1 2 3 4 5 UO	
The teacher has effectively implemented appropriate assessment strategies.	1 2 3 4 5 UO	
The teacher effectively uses technology in the classroom.	1 2 3 4 5 UO	
The teacher effectively uses teacher aides, volunteers, and student teachers.	1 2 3 4 5 UO	
Other: _____	1 2 3 4 5 UO	

Category	**Rating**	**Notes/Comments**
Classroom Management		
Area identified in pre-observation discussion: _____ _____	1 2 3 4 5 UO	
Area identified in pre-observation discussion: _____ _____	1 2 3 4 5 UO	
The teacher has effectively positioned students within the classroom (e.g., students	1 2 3 4 5 UO	

who negatively influence each other are separated).		
The teacher effectively handles disruptions.	1 2 3 4 5 UO	
The teacher clearly elicits respect from her students.	1 2 3 4 5 UO	
There is an appropriate degree of order in the classroom.	1 2 3 4 5 UO	
The teacher circulates around the room effectively.	1 2 3 4 5 UO	
The teacher displays an equitable "call on" rate (e.g., in quantity and quality among students of different genders, races, abilities, etc.)	1 2 3 4 5 UO	
Other:	1 2 3 4 5 UO	

Category	**Rating**	**Notes/Comments**
Classroom Environment		
Area identified in pre-observation discussion: _____ _____	1 2 3 4 5 UO	
Area identified in pre-observation discussion: _____ _____	1 2 3 4 5 UO	
The teacher has arranged the room in a way that is as inviting and conducive to learning as possible.	1 2 3 4 5 UO	

The students seem comfortable with the teacher.	1 2 3 4 5 UO	
Other: _____	1 2 3 4 5 UO	

Based on the classroom observation and post-observation discussion with the teacher, what are the identified priorities and next steps for improvement?

Area for Improvement	**Steps Agreed Upon for Making Improvements**	**When/How Progress Will Be Monitored**
Priority 1:		
Priority 2:		
Priority 3:		